



Student Aid Awareness Customer Profile/Customer Intimacy Form (Campaign Management)

September 2001

Context

Student Aid Awareness (SAA) is shifting from a traditional government organization to one that is more customer-focused in order to meet performance-based objectives.

This document will guide the reader about what customer intimacy includes and how to design a campaign management/marketing program that is aligned with SAA's mission, strategic planning goals, values and customer needs.

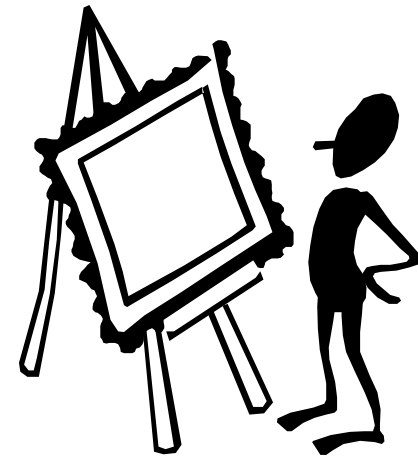
- Effective customer intimacy strategies include marketing and program management and allows SAA to plan, identify, deliver and track programs over time.
- The tools and techniques detailed in this document represent private sector best practices. Utilizing these tools enables SAA to think and operate like a private marketing organization while maintaining the status of a public sector organization.
- The objectives of this document include:
 - **Understand what customer intimacy means**
 - **Identify campaign management best practices including marketing**
 - **Determine an integrated and coordinated approach for SAA to utilize to create a holistic view of the customer**
 - **Develop examples of campaign management best practice tools**



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Customer Intimacy/Marketing

Customer Intimacy:

A strategy which focuses an organization's business system (strategy, processes, people, infrastructure) on tailoring its products, services and customer facing processes to each customer's *unique, individual needs*



**Execute
Strategy With
Marketing &
Program Mgmt.
Best Practices**

Marketing

Marketing is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives.

(American Marketing Association)

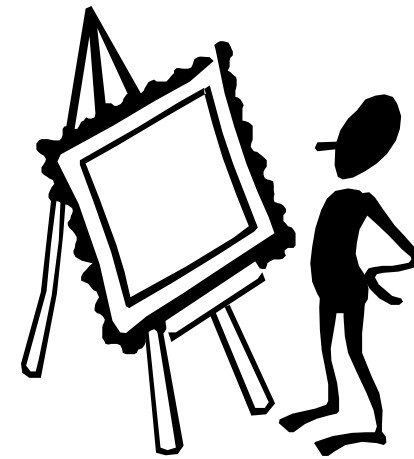
Program Management

Program Management involves managing aligned projects that share the same vision towards achieving long-range goals.

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Customer-Focused Marketing

Government has increasingly begun to focus on creating *customer-focused* models where business is built around the customer as opposed to the customer fitting into pre-determined business processes.

The campaign management Siebel demonstration, sponsored by the Students Channel on 5/8/2001, outlined the importance of developing a customer-focused model where the business operations focus around the customer.

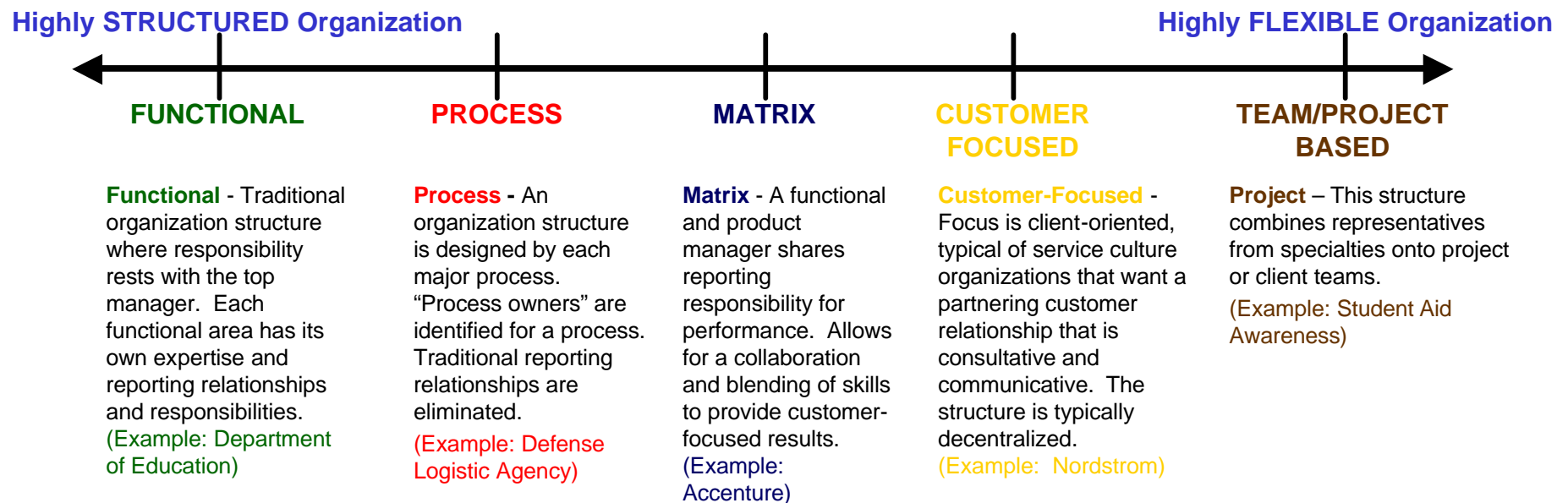


Tips To Become More Customer-Focused:

- Conduct in-depth research about your customers
- Interview managers and personnel to identify opportunities for exceptional service
- Understand customers' expectations by developing profiles of the customer
- Create business processes centered around customers rather than government policies
- Gather feedback from customers and develop a tracking system
 - e.g. Microsoft Excel, Campaign Management Tool, Program Management Tools

Link Approach to Organizational Lifecycle

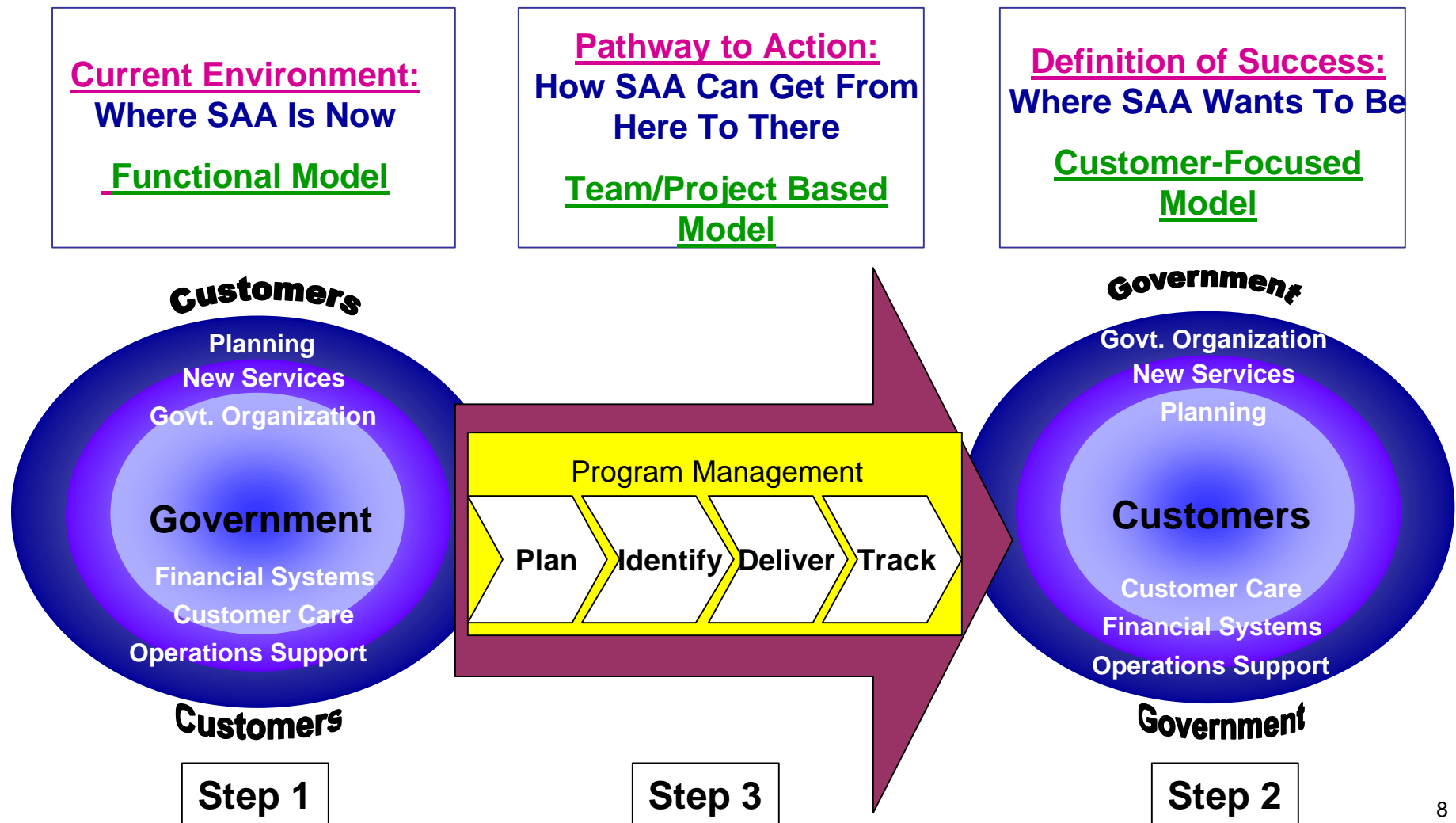
To shift from a highly structured, functional organization to a flexible, customer-focused organization requires SAA to use a team/project based model. This will enable SAA to develop a comprehensive campaign management approach to support their business goals, objectives, and processes.



Organizational Lifecycle

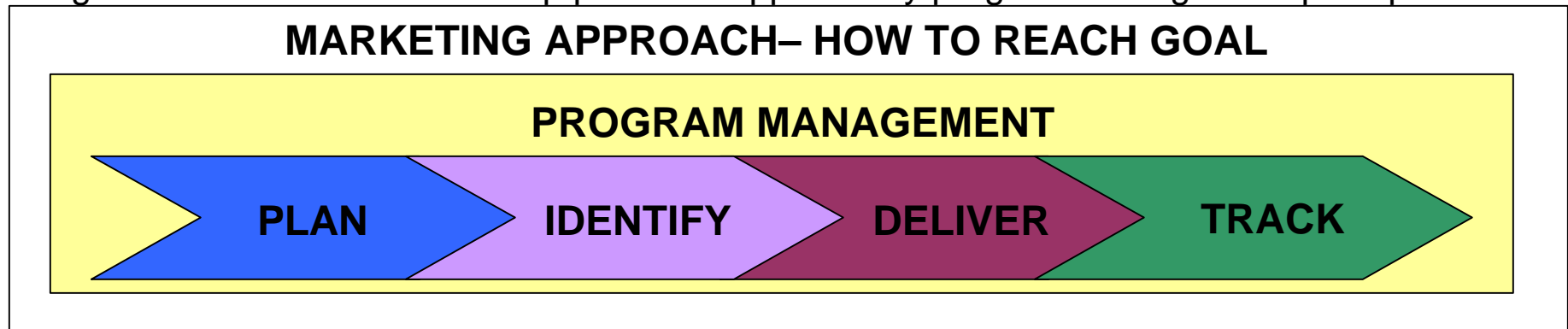
Customer-Focused Marketing Approach

This model provides a structure for understanding how government is shifting from a functional model to an organization that builds processes and services around customers.



Customer-Focused Marketing Approach

The pathway to action that will allow SAA to reach its goal of becoming a customer-focused organization includes a four step process supported by program management principles.



- | | | | |
|---|--|---|--|
| <ul style="list-style-type: none"> ▪ Define SAA Purpose, Goals, Values ▪ Understand Benefits of Marketing ▪ Conduct Market Research* ▪ Market Research Process ▪ Observe the Competition* ▪ Assess your Organization* | <ul style="list-style-type: none"> ▪ Identify All Potential Customers ▪ Identify SAA Target Audience(s) ▪ Create an Audience Analysis* ▪ Create a Customer Profile Form* ▪ Identify Key Messages for Audience ▪ Create Marketing Plan* | <ul style="list-style-type: none"> ▪ Target Key Messages to Target Audiences ▪ Compile Profile Forms* ▪ Attend Conferences and Distribute Materials* ▪ Form Partnerships with Local, State and National Organizations ▪ Distribute SAA Publications ▪ Execute Marketing Plan* | <ul style="list-style-type: none"> ▪ Track Marketing ▪ Monitoring Methods* |
|---|--|---|--|

*** Indicates an associated appendix**



Define SAA Purpose, Goal, Values

Purpose

- Responsible for targeting segments of the student population (both students and families) for Student Aid Awareness programs
- Provide information and guidance to assist in postsecondary school planning and decision making
- Educate potential program participants through Program Outreach, Program Information & Publications and Student Population Research

Goal

- To increase the number of individuals exposed to Student Aid Awareness, including student financial aid and/or early awareness information.



Values

- *Shared Responsibility* - We will cooperate with each other to achieve the best results.
- *Social Responsibility* - We choose to work here because we want to help people & society.
- *Commitment to Excellence* - We are committed to doing the best job possible.
- *Integrity* - We will stand up for what we believe is right.
- *Human Dignity* - We recognize the value of every human being in our daily behaviors.



Understand Benefits of Marketing

The development and implementation of a comprehensive marketing plan allows SAA to:

- **Coordinate efforts to increase awareness about financial aid opportunities**
- **Make reasoned marketing decisions by using current market research**
- **Reach target audiences with key messages**
- **Provide feedback about effectiveness of programs**
- **Achieve PBO goals**
 - *Increase Customer Satisfaction*
 - Increase awareness of financial aid programs
 - Create effective marketing strategy by researching customer needs
 - *Decrease Unit Cost*
 - Promote programs (e.g.FAFSA on the Web) that have a direct effect on unit cost
 - Budget forecasting and planning
 - *Increase Employee Satisfaction*
 - Ensures efforts are not duplicated by multiple teams
 - Plan and manage workload





Conduct Market Research

The process of becoming more customer-focused begins with in-depth benchmarking research among your customers and your competitors' customers. Marketing research is the function that links the customer and public to the marketer through information used to answer the following:

- **Who is your customer?**
- **What product or service are you selling?**
- **Who is your competition?**
- **What is your target market?**
- **What are your distribution channels?**
- **What advertising appeals are most effective?**
- **How to promote service?**
- **What are marketing best practices**





Conduct Market Research

Marketing Research:

- Specifies information required to address issues
- Designs the method for collecting information
- Manages and implements data collection process
- Analyzes the results
- Communicates the findings and their implications

Analyze the Market

- Look at the Big Picture – Look at national organizations, Internet, government websites
- Be Aware of Trends – Trends in financing education in print
- Conduct Local Research – Identify partners with local organizations
- Identify Customers – Understand what audience to target



APPENDIX A – SUGGESTED TOOL

Market Analysis

- This document can be used to better understand key marketing questions.



Market Research Process

STEPS TO TAKE

1. Start with desk research to find general information about the market in which you are interested
2. Conduct more detailed desk research to focus on specific market information
3. Identify organizations in the financial aid market
4. Establish partnerships
5. Contract research to gain more detailed information or confirm other market research findings
6. Compile conclusions which will form an important part of planning SAA's marketing



HOW TO RESEARCH

1. Search the Internet and visit a library to find published market research information
2. Obtain trade or specialist consumer publications as appropriate
3. Analyze organizations' strengths and weaknesses
4. Approach organizations and visit conferences/exhibits
5. Do questionnaires or test marketing as appropriate
6. Create a comprehensive marketing plan based on analysis of market research



Observe the Competition

Although SAA operates in the public sector and does not have typical competitors, it is important to consider what other organizations are providing financial information and how they are competing for customers' time and attention.

In the private sector, the term "competitor" is often used to describe organizations offering the same or similar product or service. In turn, companies compete for customers' business. The term competitor will be used throughout this document to represent organizations that provide information about student financial aid for post secondary education. In essence, SAA's competitors are those organizations that could decrease the likelihood of customers seeking information and/or assistance from the Department of Education.

Observe the Competition

- Identify competitors and learn about market
- Gather information about the competition
- Assess competitors' strengths/weaknesses
- Discover competitive advantage
- Learn more about market



APPENDIX B – SUGGESTED TOOLS

Providers of Financial Aid Information

- This document identifies providers of financial aid information.

Methods to Research Competition

- This document identifies who your competitors are, your strengths/weaknesses and how your service differs from competition?

Competitor Analysis

- This tool profiles potential customers.



Assess Your Organization

Student Aid Awareness' marketing initiatives should be anchored in a sound and thorough understanding of the current strengths, weaknesses, opportunities and threats (S.W.O.T. Analysis) facing the organization:

- What type of business is SAA in?
- What is the nature of SAA's product(s) or service(s)?
- What market segments does SAA intend to serve?
 - Describe age, sex, income level & life-style characteristics of market segments
- What are SAA's customers' wants and needs?
- What strategies will SAA use to attract customers?
- What is SAA's unique selling proposition (USP)?
- Who is the competition, and what will SAA do to control your share of the market?
- Does SAA have a team structure with the right balance of skills and experience?
- Are there adequate program management tools to manage the organization?



APPENDIX C – SUGGESTED TOOL

S.W.O.T. Analysis

- This tool documents the strengths, weaknesses, opportunities and threats facing SAA.



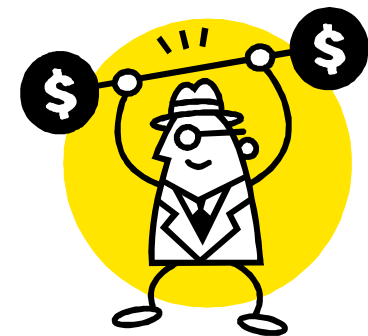
Assess Your Organization

Unique Selling Proposition (USP)

A USP is a unique message that expresses an organizations' distinct qualities. This message should be used consistently in marketing and promotional efforts.

To determine your USP, ask the following questions:

- What is unique about SFA as compared to other financial aid organizations?
- Which of these factors are most important to customers?
- Which of these factors are not easily imitated by other organizations?
- Which of these factors can be easily communicated and understood by customers?
- Can SAA construct a memorable message about its unique service?
- How will SAA communicate this message to customers?



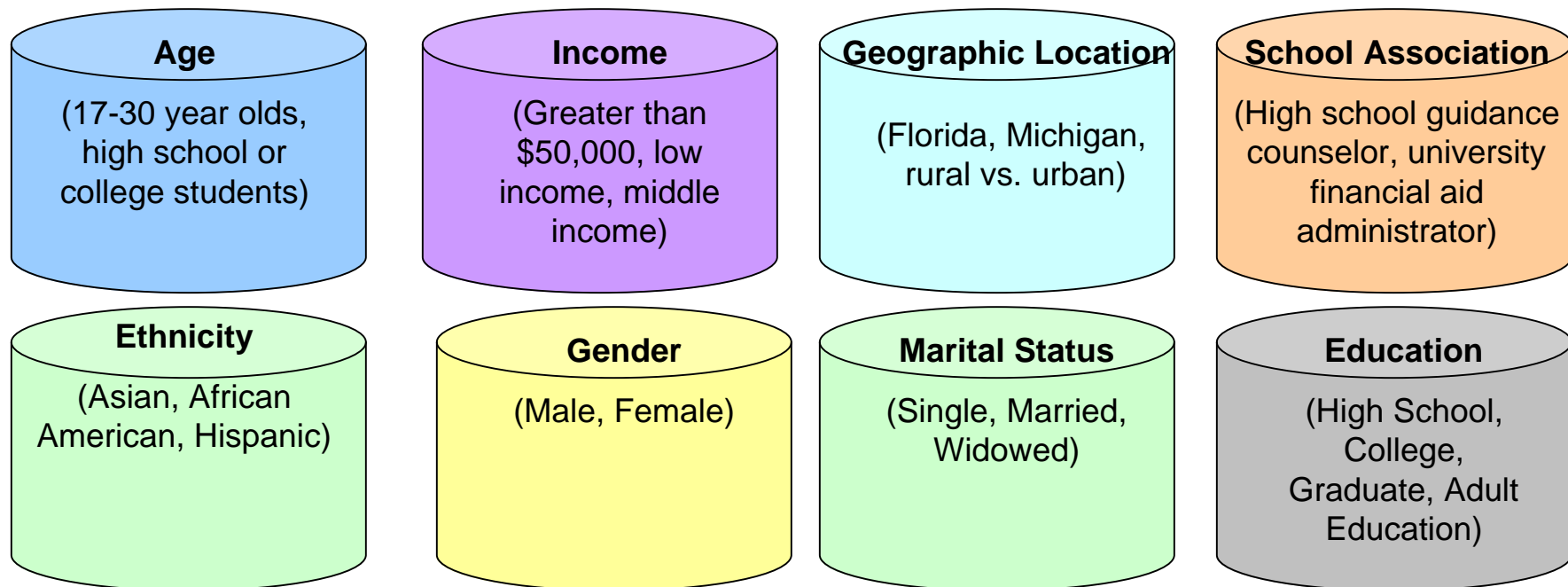


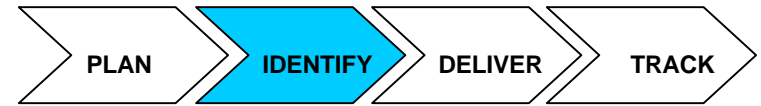
Identify All Potential Customers

Student Aid Awareness provides service to a wide and diverse group of customers. Anyone associated with helping put America through school can be considered a customer. While it is important to acknowledge all customers, it can be beneficial to *segment* customers into groups based on common characteristics in a process often known as *market segmentation*.

Market Segmentation

- A market segment is a group of customers with similar needs
- Consider the total possible market in much smaller segments or parts, including **examples** such as:





Identify SAA Target Audience(s)

Ideally, every organization has a desire to reach all potential customers. However, due to time and budget constraints this is not a feasible or realistic option. To best serve the majority of customers and have the greatest impact on your organization's goals, identify *target audiences*.

A target audience is a *segment* of the population that can most benefit from your service and have the greatest ability to affect the success of your service and goals. (e.g. High school juniors and seniors, low income, or the Spanish population in California).

Considerations in Identifying Target Audiences

1. Can you realistically reach this group (consider size, location, etc.)?
2. Does current market research indicate that this group will benefit from targeted marketing efforts and affect the success of SAA?
3. Is the information presented in a format that will be easily accessible to the audience?
4. How successful will the audience be throughout the loan process in terms of being able to pay back a loan?
5. Is this an audience of direct customers (students) or a conduit audience (e.g. guidance counselors) that can act as a vehicle to provide information to students?



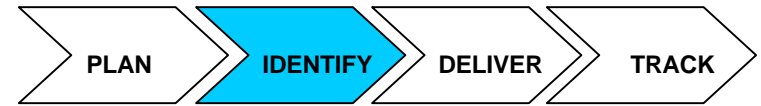
APPENDIX D – SUGGESTED TOOLS

Methods to Reach Audiences

- This document identifies common methods to reach audiences.

Financial Aid Conferences

- This tool identifies conferences related to financial aid.



Create an Audience Analysis

After identifying target audiences, it is important to have an understanding of the unique aspects of each group. Creating an audience analysis will allow SAA to create an effective marketing plan appropriate to the audience and will help ensure that marketing efforts provide the desired impact and result.



APPENDIX E – SUGGESTED TOOL

Audience Analysis

This tool is an example of how to address:

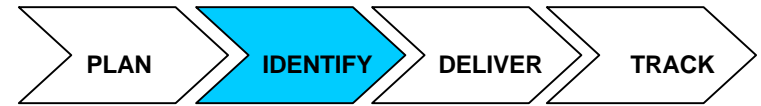
- Approximately how many people are a part of this audience?
- What is a realistic method for reaching this group?
- What key messages are appropriate for the audience?



Create an Audience Analysis


To better understand your target audience(s), consider:

Is this a primary or secondary audience?	<ul style="list-style-type: none"> ▪ Students are a primary audience. ▪ Guidance counselors considered secondary audience as they are not the direct recipient of SFA services, but have ability to share information with students. ▪ There are also internal SFA audiences that need to receive key messages.
What do they read?	<ul style="list-style-type: none"> ▪ <i>The Washington Post</i> ▪ <i>USA Today</i> ▪ <i>People Magazine</i> ▪ College newspapers
What web sites do they visit?	<ul style="list-style-type: none"> ▪ Major search engines ▪ Online news sites ▪ Sports sites ▪ Entertainment sites
Where do they spend their time?	<ul style="list-style-type: none"> ▪ Classrooms ▪ Public transportation ▪ Shopping malls
Who do they listen to?	<ul style="list-style-type: none"> ▪ Parents ▪ Friends ▪ High school counselors ▪ Media



Create a Customer Profile Form

- In order to understand SAA's customer needs, a customer profile form can be used to develop marketing solutions around the customers' needs.
- Create a comprehensive profile of each of your target audiences to track demographic information.
- Customer Profile Forms can be completed directly by students or by information gathered from call centers.
- Allows SAA to track customer information and provide programs around customers needs.
- SAA can analyze their customers information to identify target audiences.
- Considerations:
 - Sex
 - Age
 - Ethnicity
 - Education
 - Geographic location
 - Marital status
 - Income



APPENDIX F – SUGGESTED TOOL
Student/Partnership Customer Profile Forms
This tool can be used to identify the following:

- Customer demographics
- Customer needs
- Appropriate methods of distributing and promoting services



Identify Key Message to Audiences

Students want to understand basic financial aid concepts such as: what aid is available, what are the eligibility requirements, how to apply and where to find more information and how to apply. Effective key messages should be tailored to fit the needs of the audience in content and style.

What financial assistance is available to students?

- William D. Ford Federal Direct Loan Program (Direct Loan)
- Federal Pell Grant Program
- Federal Family Educational Loan Program (FFEL)
- Campus Based Programs:
 - Federal Perkins Loans
 - Federal Supplemental Educational Opportunity Grant (FSEOG)
 - Federal Work Study

Who is eligible?

- Students, schools and programs must all meet eligibility criteria

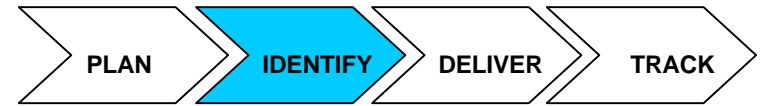
How can you apply for federal financial aid?

- Complete Financial Application for Federal Student Aid (FAFSA) (paper or electronic copy)

What resources provide financial aid information?

- Web Sites:
 - www.ed.gov/studentaid
 - www.fafsa.ed.gov
- Toll-Free Phone Numbers:
 - U.S. Department of Education – 1-800-4-FED-AID
 - FAFSA on the Web assistance – 1-800-801-0576
- Publications:
 - *The Student Guide*
 - *High School Counselor's Handbook*
 - *Funding Your Education*





Create Marketing Plan

A marketing strategy

- Details the planned approach to providing a service
- Addresses where the organization is, where it wants to go and how it can reach its goals
- Provides a high level roadmap and explains what to “do” to get customers to use the service
- Requires that SAA be committed to a unique marketing plan
- Sets out the objectives of marketing and encompasses market research
- Serve as a guide on which to base decisions and ensure that everyone in the organization is working together to achieve the same goals

Success =

Integrating ALL aspects of marketing

(e.g. gather market info., analyze market trends, prepare marketing plan)



APPENDIX G – SUGGESTED TOOLS

Elements of a Marketing Plan

- This document identifies elements in a marketing plan.

Marketing Plan

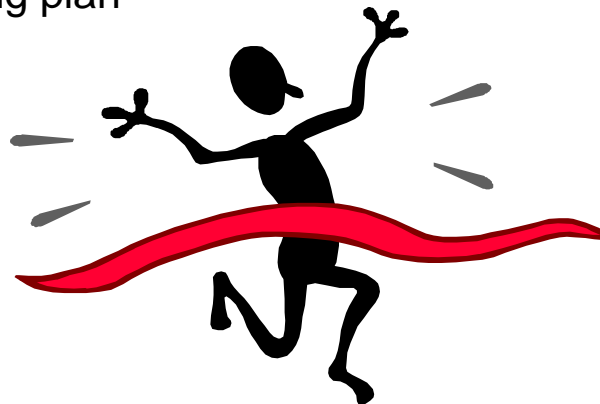
- This tool provides a template to create an overall marketing plan for SAA campaign management.



Deliver Marketing Plan

The third step in the customer-focused marketing approach is to deliver or carry out SAA's marketing strategies by:

- Targeting key messages to target audiences
- Completing profile forms for specified customer groups
- Attending conferences and distributing materials
- Forming partnerships with local, state and national organizations
- Distributing SAA publications
- Executing the marketing plan





Track Marketing

The final step in the customer-focused marketing approach is to record customer information and the outcome of completed initiatives. It is important to document the results of each effort. Collecting feedback is an effective way to understand the customer as well as the strengths and weaknesses of each initiative. Feedback allows organizations to understand customers' reactions and can be used to improve future campaign management efforts.

Considerations:

- Understand how customers perceive your performance on the service dimensions that most impact their decisions and recommendations.
- Track the incidences of information sharing as a result of SAA-related outreach activities and/or the number of individuals receiving information from SAA-related outreach activities.
- Examples:
 - Track customer profile forms
 - Use Program Mgmt. tools and techniques (e.g. communication planning, budget, etc.)
 - Record conference evaluations



APPENDIX H– SUGGESTED TOOLS

Conference Evaluation

- This tool can be used to evaluate the success and effectiveness of SAA's attendance at each conference.

Publications Evaluation

- This tool can be used to evaluate the success and effectiveness of SAA publications.



Monitoring Methods

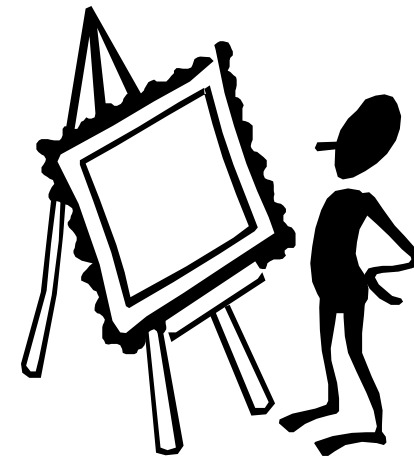
These monitoring methods provide feedback about the success of marketing initiatives with publications, partnerships, etc.

<i>Method</i>	<i>What to Do</i>	<i>Points to Consider</i>
Reply by Mail	If you are asking the reader to complete and return a coupon, add a different printed code to the coupon for each advertisement	Highly effective. Suitable for any advertisement likely to get a postal response
Reply by Phone	When potential customers call, ask how they heard about you.	Effective, although some callers cannot recall how they heard about you. Also, it may appear intrusive to question the caller.
Reply by Email	Add up the number of responses each time an advertisement appears.	Difficult to assess how sender heard about you – use a different email address on different advertisements to clarify where the sender saw your ad.
Website Counter	A counter on your website adds up how many visits the site has received.	Shows the number of visits but does not reveal how visitors found your sight or if people are visiting your site more than once.
Person-To-Person	Simply ask the person where he/she heard about the product or service.	Effective, although some people cannot recall how they heard about you.
Bring a Coupon	Include a coupon in ads, which the reader has to bring to get some benefit, such as a gift or discount.	Requires an incentive for customer to bring the coupon.

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Marketing Ideas

Now that you have a better understanding of marketing concepts, you can consider what marketing ideas may be valuable, effective and appropriate for SAA.

- Run a public service announcement (PSA) on national television
- Make speeches to civic clubs and leave brochures on the tables
- Contribute to SFA and industry related newsletters
- Consider offering promotional items at conferences/partnerships
- Take advantage of other organizations that work toward educating the public about financial aid opportunities
- Update links to websites



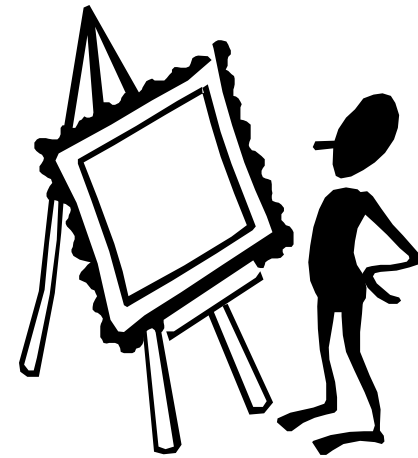
Marketing Ideas

- Add SFA's e-mail address and Web address to all literature (business card, letter head, newsletters).
- Announce the launch of your Web site or bulletin board conference site.
- Email Web masters that relate to your organization and ask them to link to your site.
- Register your Web site with every Web search engine you come across. Some of the more popular web search engines are: Yahoo, <http://www.yahoo.com> Lycos, <http://www.lycos.com> MSN, <http://www.msn.com> Netscape, <http://www.netscape.com> Infoseek, <http://www.infoseek.com>
- List your URL address in every email signature on every e-mail you send.
- Send press releases to local newspapers and professional publications announcing your Web site and/or bulletin board site, and remember to add your email address and Web address to all press releases.
- Participate regularly in relevant email lists and newsgroups to build a reputation for SFA and its Web site as a valuable resource monitor, if you can (via tracking software, on-line questionnaire or form, etc.), the number and type of people visiting your site.
- Make sure staff is aware of all on-line activities and can refer people as appropriate.

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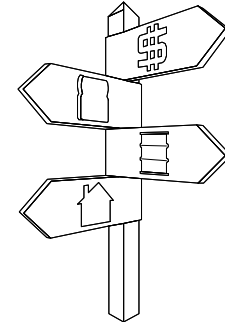
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Marketing Resources

Internet

- Business Marketing Association (<http://www.marketing.org>)
- Market It Right (<http://www.marketitright.com>)
- Market Research Association (<http://www.mra-net.org/>)
- Marketing Virtual Library (<http://www.knowthis.com/>)



Books

- Herron, Douglas (1997) ***Marketing Nonprofit Programs and Services***. Jossey-Bass.
- Kotler, P. (1996) ***Marketing for Nonprofit Organizations***. (5th ed.). Englewood Cliffs, NJ: Prentice Hall, Inc.
- Kotler, P. & Andreasen A. (1996) ***Strategic Marketing For Nonprofit Organizations***. (5th ed.). Englewood Cliffs, NJ: Prentice Hall, Inc.
- Lovelock, Christopher & Weinberg, Charles. ***Public & Nonprofit Marketing: Cases and Readings***. (2nd ed.). Redwood City, CA: Scientific Press
- McLeish, Barry M. (1995) ***Successful Marketing Strategies for Nonprofit Organizations***. New York: John Wiley. Rados, David L. (1996) ***Marketing for Nonprofit Organizations***. (2nd ed.). Auburn House Pub.

Government Agencies

- Market Research & Statistics - U.S. Census Bureau – (www.census.gov)
- National Center for Education Statistics (NCES) – (www.nces.ed.gov)
- Other Resources – (<http://www.knowthis.com/research/demogovt.htm>)

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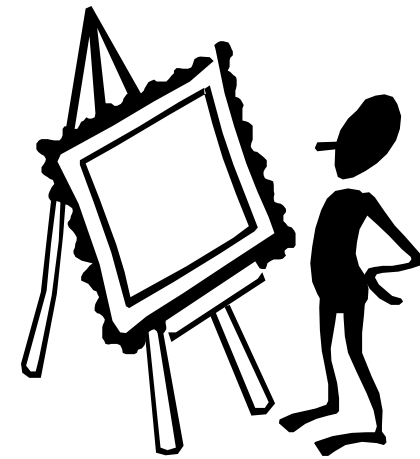
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Continuous Improvement

To evaluate the effectiveness of SAA's marketing plan, consider addressing the following:

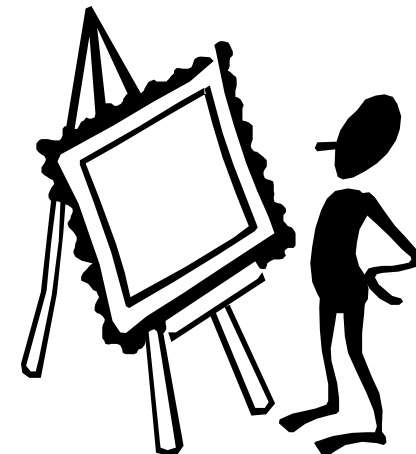
- How do we make customers' experiences as pleasurable and effective as possible when using our product/service?
- What feedback are we getting from program evaluation activities?
- What should SAA be doing to improve customer service?
- Evaluate the success of marketing initiatives.
- Revise the plan as necessary based on feedback.



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Appendix A



APPENDIX A – SUGGESTED TOOL

Market Analysis

- This document can be used to better understand key marketing questions.

Appendix B



APPENDIX B – SUGGESTED TOOLS

Providers of Financial Aid Information

- This document identifies providers of financial aid information.

Methods to Research Competition

- This document identifies who your competitors are, your strengths/weaknesses and how your service differs from competition?

Competitor Analysis

- This tool profiles potential customers.



Providers of Financial Aid Information

Students are often overwhelmed with the amount of financial aid information they receive. Thus, it is important for SAA to differentiate Department of Education products and services to customers and be aware of other organizations that provide similar information. This will allow SAA to develop a unique and targeted marketing plan.

The following are **examples** of institutions that provide financial aid information and thus can be considered competitors.

Private Lenders

- Private banks (e.g. Citibank)
- Sallie Mae
- Guaranty agencies

Major National Scholarship Programs

- National Academy of American Scholars
- National Collegiate Athletic Association
- National Merit Scholarship Program
- United Negro College Fund

Websites

- Finaid.org
- Acedemicinfo.net/studentaid
- Usagroup.com
- Educaid.com
- Wiredscholar.com
- Collegeview.com



Appendix C



APPENDIX C – SUGGESTED TOOL

S.W.O.T. Analysis

- This tool documents the strengths, weaknesses, opportunities and threats facing SAA.



Methods to Research Competition

- Direct Observation
- Using their service
- Written Information
 - Marketing/advertising publications
 - Local newspapers/business journals
 - Industry/trade association publications
 - Industry research and surveys
- Advertisements
- Internet
- Conferences





S.W.O.T. Analysis (Example)

Strengths

- Committed to SAA purpose, goals and values
- Responsible for publications that are informative and have a strong reputation
- Enabling a supportive environment for employees
- Competent, professional and committed employees

Opportunities

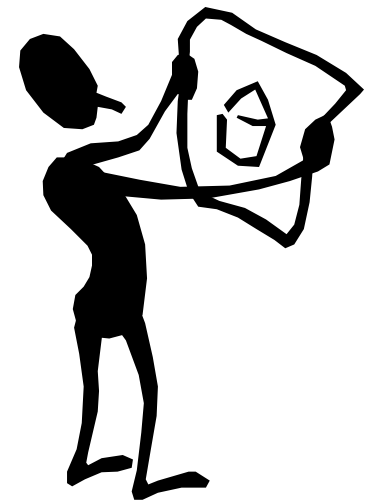
- Create an “ad” / public service announcement campaign
- Build local and national partnerships
- Participate in more national conferences
- Conduct high school counselor’s training

Weaknesses

- Little market research conducted and used to facilitate decision making processes
- Currently receive no feedback on publications or customer service
- Do not consistently profile customers to obtain critical information on customers
- Lack of comprehensive marketing plan

Threats

- Limited budget
- Lack of staffing resources
- Private industry





APPENDIX D – SUGGESTED TOOLS

Methods to Reach Audiences

- This document identifies common methods to reach audiences.

Financial Aid Conferences

- This tool identifies conferences related to financial aid.



Methods to Reach Audiences

<i>Method</i>	<i>Cost</i>	<i>Advantages</i>	<i>Disadvantages</i>
Direct Mail	Low	<ul style="list-style-type: none"> ▪ Targeted Audience ▪ High response rate (2-5%) 	<ul style="list-style-type: none"> ▪ Time-consuming to locate or produce good mailing list
Small Poster	Low	<ul style="list-style-type: none"> ▪ Large readership ▪ Long life 	<ul style="list-style-type: none"> ▪ Limited locations; Message must be short to make an immediate impact
Mailbox Flyer	Low	<ul style="list-style-type: none"> ▪ Can be partially targeted 	<ul style="list-style-type: none"> ▪ Low response rate ▪ Post office distribution is most effective but increases costs
Partnerships	Low	<ul style="list-style-type: none"> ▪ Provides community support 	<ul style="list-style-type: none"> ▪ Potential for small audience based on size of organization
Conferences	Low/Medium	<ul style="list-style-type: none"> ▪ Potentially huge audience 	<ul style="list-style-type: none"> ▪ Should have “attention grabbing” booth
Website or CD-ROM	Low/Medium	<ul style="list-style-type: none"> ▪ Potentially huge audience ▪ Full color, sound, and some animation possible 	<ul style="list-style-type: none"> ▪ Difficult to stand out in the crowd
Directories	Low/Medium	<ul style="list-style-type: none"> ▪ Ad life is one year; large circulation ▪ Allows comparison with competitors 	<ul style="list-style-type: none"> ▪ Can only make changes annually
Ad in Local Paper	Medium	<ul style="list-style-type: none"> ▪ Local audience ▪ Can repeat often 	<ul style="list-style-type: none"> ▪ Readership much larger than target market
Publications	Medium/High	<ul style="list-style-type: none"> ▪ Wide audience 	<ul style="list-style-type: none"> ▪ Unable to make modifications until next publication
Ad on Radio	High	<ul style="list-style-type: none"> ▪ Wide audience 	<ul style="list-style-type: none"> ▪ Ad time brief so needs repeating frequently
Ad in National Magazine	High	<ul style="list-style-type: none"> ▪ National audience 	<ul style="list-style-type: none"> ▪ Need to book months ahead



Methods to Reach Audiences

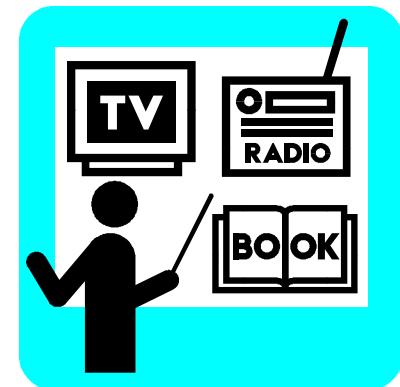
Once key messages are identified, SAA should consider how to distribute and advertise aid awareness information to audiences.

Distribution:

- The route your service takes from you to the end-user
 - e.g. form partnerships with community organizations, attend conferences

Advertising:

- The route to provide awareness about the service and promote it to customer
 - Defining the objectives of the advertising
 - Timing must be right
 - Choose the correct media
 - Design effective advertisements/public service announcements
 - Monitor results
 - e.g. create posters, web site, publications



Appendix E



APPENDIX E – SUGGESTED TOOL

Audience Analysis

This tool is an example of how to address:

- Approximately how many people are a part of this audience?
- What is a realistic method for reaching this group?
- What key messages are appropriate for the audience?

Appendix F



APPENDIX F – SUGGESTED TOOL

Student/Partnership Customer Profile Forms

This tool can be used to identify the following:

- Customer demographics
- Customer needs
- Appropriate methods of distributing and promoting services

Appendix G



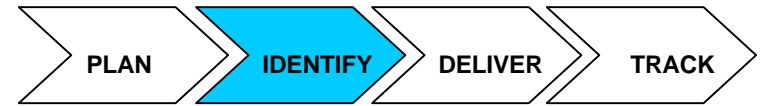
APPENDIX G – SUGGESTED TOOLS

Elements of a Marketing Plan

- This document identifies elements in a marketing plan.

Marketing Plan

- This tool provides a template to create an overall marketing plan for SAA campaign management.



Elements of Marketing Plan

<i>Section</i>	<i>What to Include</i>
Executive Summary	<ul style="list-style-type: none"> ■ SAA Mission Statement ■ Purpose of Marketing Plan ■ Brief Description Past Years Marketing Efforts
Situation Analysis	<ul style="list-style-type: none"> ■ Market Summary (Demographics, Needs, Trends, Growth) ■ SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) ■ Competition ■ Keys to Success/Critical Issues
Marketing Strategy	<ul style="list-style-type: none"> ■ Mission ■ Marketing Objectives <ul style="list-style-type: none"> ■ Current Marketing Initiatives ■ Analysis of Marketing Effectiveness ■ Financial Objectives ■ Target Marketing ■ Positioning ■ Marketing Mix ■ Marketing Research ■ Advertising/Promotion
Financials/Budget	<ul style="list-style-type: none"> ■ Budget/Expense

Appendix H



APPENDIX H– SUGGESTED TOOLS

Conference Evaluation

- This tool can be used to evaluate the success and effectiveness of SAA's attendance at each conference.

Publications Evaluation

- This tool can be used to evaluate the success and effectiveness of SAA publications.